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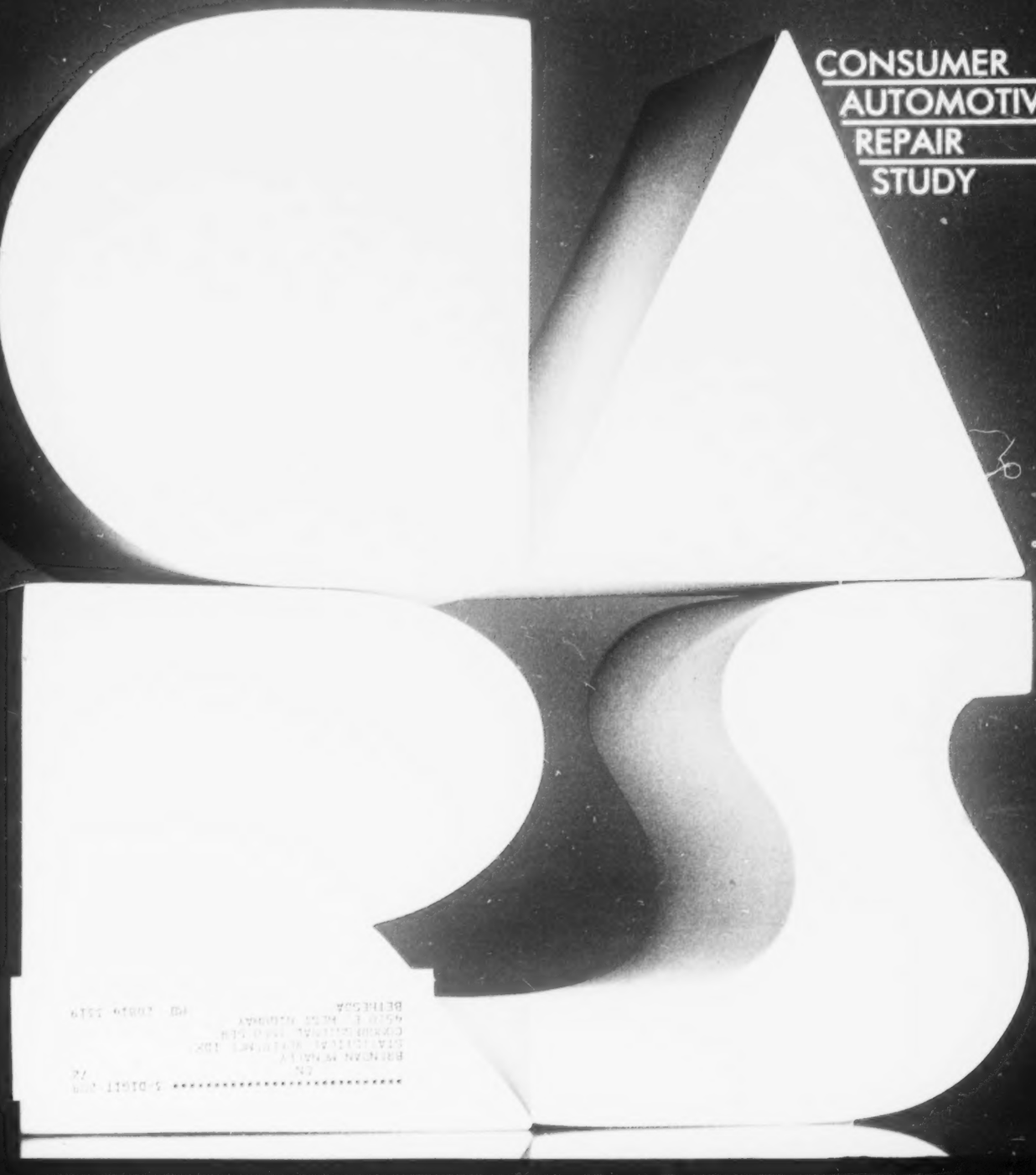
# AUTOMOTIVE MARKETING

Uniquely Positioned To Serve The Merging Retail And Traditional Aftermarkets

March 1992

## CONSUMER AUTOMOTIVE REPAIR STUDY



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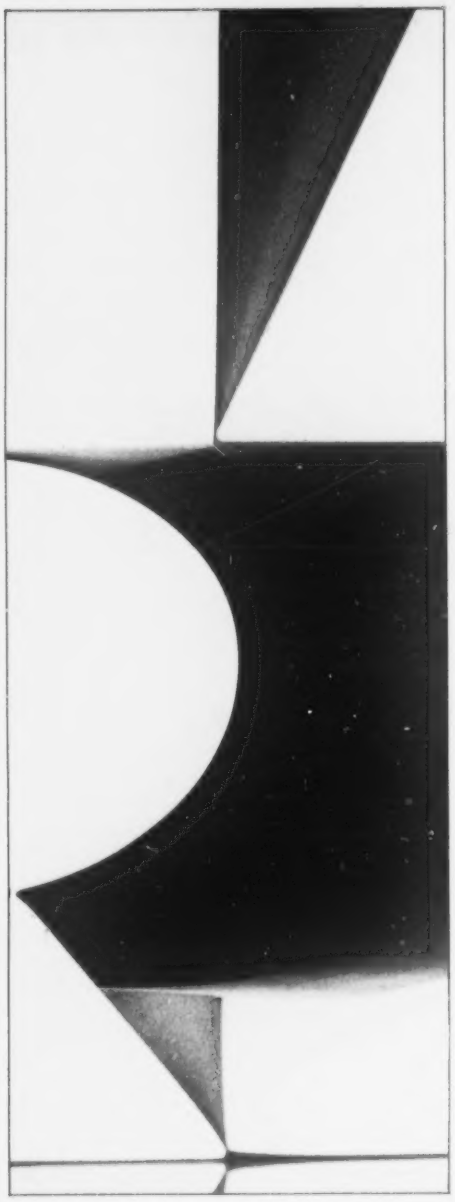

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JESSE H. NEAL AWARD-WINNING PUBLICATION FIVE OUT OF EIGHT YEARS


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# MARKET LINE

## Automotive Representatives Form Organization Dedicated To Helping Rep Business

Ties between reps have traditionally been as flimsy as fax paper, but a new rep organization plans to change all that. During the week of February 10, a group of reps met in a "locked-door" session in Palm Beach, Florida, to put the organizational finish on the Automotive Manufacturers Representatives Association (AMRA). Chairman Harvey Goldberg (Harvey Goldberg Marketing, Van Nuys, CA) said, "We have a nucleus, now we have to put it into writing. We're going to lock ourselves away from Thursday to Saturday."

News of the new rep association has been linked to reps' concerns over the reported banning of reps by major retailers such as Wal-Mart. In 1986, reps formed the OMR (Organization of Manufacturers Reps) to combat earlier Wal-Mart rumors. After running some striking advertisements in national newspapers, however, OMR faded away. But Goldberg stressed that AMRA "is not a tar and feather group. This is a professional group that wants to become more professional."

Goldberg said the impetus for AMRA began about a year ago when Dave Rognlien (Rognlien Wright Perman, Gardena, CA) got together some California reps. "I went to a couple of meetings he held," Goldberg said. "It took off for a little bit. Groups in Dallas and California got quite interested. Al Melillo (Schnair Sales, Arlington, TX) did a good job (organizing) in Texas. Then I went to the Consumer Electronics Show and met Bill Weiner, who's high in the ranks of the Electronic Reps Association (ERA), Chicago."

The ERA has been around for 55 years and represents some 1,750 electronics rep firms. Weiner, who's been director of marketing at ERA for eight years and previous to that ran his own rep firm for 23 years, said, "I'm from the electronics industry, but a rep is a rep is a rep, whatever field he's in. A few automotive reps came to us and said we need our own organization. In other automotive associations the reps are treated as rep councils or rep committees. They're not rep-oriented. When an issue comes along, they can't even voice it or take action. Only a self-standing organization can do that. Larry Hecker at APAA (Automotive Parts and Accessories Association), Bethesda, MD) was very supportive. He told the reps to form their own self-standing organization. You need it."

**Sales force costs as percentage of sales: 3.7%**

Goldberg continued, "The ERA said they'd be happy to loan us Weiner and let us operate under their umbrella for mail and phone. Then it started to move. We went to the rep meeting at the APAA Show and did a pitch for AMRA. Dick Salsitz (Dick Salsitz and Associates, Brea, CA) was the first to sign and I was the second. Now we have about 26 to 30 paid members. We also went to SEMA to explain what we're doing and had about 25 or 30 people in the room."

While it's still unclear as to where exactly AMRA will go, Goldberg has some thoughts on the matter: "Forget Wal-Mart, we're interested in doing something nationally. It's not like the OMR. That was a good cause, but it ran out of money. I think they attacked the problem in the wrong way: You don't go up against a giant, you just state your case. I want to see total involvement of agency people. We want to unite and get some guidelines reps can work with. Things like universal contracts, universal insurance, maybe even car rentals. Agencies have been on their own for much too long. Nobody has to be afraid of listening to one another."

Weiner, who will become AMRA's president, said the group has some "mundane" steps to take in Florida. "We have to approve the by-laws, set a mission statement, decide on the makeup of the membership, and form the board of directors. Once we know who we are, what we are, and where we want to be, then we can say how to get there."

Stating the reps' case might become more important in the 1990s. The AMRA comes on the scene just as the rep's role is changing in the merging market. There are somewhere in the neighborhood of 1,000-1,200 rep firms ranging from one-man-at-home operations to the giant 20 and 30-salesman multi-office operations that are becoming more common. Proably the biggest challenge to the rep is a shrinking customer base that results in power buying by the surviving chains. For example, in Minneapolis until this year, a rep could call on four regional chains—Champion, Crown, 10,000 Auto Parts and Big Wheel—during one visit. Today, only two of these chains remain. Do two chains buy as much product as four? Would a new supplier prefer four chances to sell a line rather than two? What happens to the reps selling the defunct chains? How much added power do the two surviving chains have in the market? These are all questions reps have to learn to deal with on a daily basis.

Rightly or wrongly, many power buyers feel that they can do better dealing with principals or at least top-echelon executives rather than reps. Weiner said the big chains are attempting to dictate to manufacturers how they can do business. "And that's just wrong. The manu-

**WHY REPS LOSE BUSINESS**

According to Lavin Associates, Chesire, CT, principals fire reps for the following reasons (responses have been rounded off):

- 36%: Not enough manpower, sales or marketing activity.
- 24%: Not enough sales.
- 18%: Poor product knowledge or technical incompetence.
- 14%: Poor communications, lack of market feedback.
- 9%: Competitive line conflicts.

Source: Lavin Associates

TRADE SHOWS

### AAIW Awaits APAA Decision

By the time you read this, the decision may already have been announced, but as we go to press in mid-February the Automotive Parts and Accessories Association (APAA) is deciding whether to join the Automotive Aftermarket Industry Week (AAIW) in Las Vegas.

AAIW, which consists of the Automotive Service Industry Association Convention from November 1-2, the Big "I" and Specialty Equipment Market Association (SEMA)/Automotive International (AI) Shows from November 3-6, and other activities, is directed by members of ASIA, SEMA/AI, and the Motor Equipment Manufacturers Association (MEMA).

At the group's February 4 meeting in Phoenix, AAIW discussed APAA joining AAIW. However, a final decision must be made by March 1. Presently, the APAA Show is scheduled to run from October 1-3 in Chicago. ■

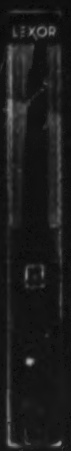
**THE COST OF A SALES CALL**

According to *Sales and Marketing Management* magazine, the cost of a sales call (hotel, meals, car) has risen from $118 in 1986 to $210 in 1990.

| | |
|---|---|
| 1986: | $118.46 |
| 1987: | 131.51 |
| 1988: | 171.57 |
| 1989: | 196.26 |
| 1990: | 210.34 |

Source: *Sales and Marketing Management*, June 1991

# IT PERFORMS ON THE SHELF

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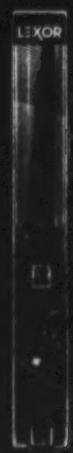




# MARKET LINE

**HOW REPS SPEND THEIR TIME**

| | |
|---|---|
| Face to face selling: | 30% |
| Travel and waiting: | 23 |
| Telephone sales: | 20 |
| Administration: | 14 |
| Service calls: | 13 |

Source: Dartnell Corporation, 26th Survey of Sales Force Compensation

facturer establishes policies and along comes someone else and wants an officer of the company to call on him. You'll save so much money, and we want that too. What we'd like to see is the manufacturer say no. We have a contract and a third party should not intrude."

Weiner said, "We have to reinstill the confidence factor in reps. When the reps came to us, their feeling was: What can we do, we're only reps? We have to build confidence and understand how important they really are and what value-added services they provide in the marketing partnership.

**Annual turnover rate of salesmen: 9.3%**

"It has to be a proactive organization. The challenge is going to be getting people to listen and actually put money down. Some people have invested in other groups and dropped out because they never got their money's worth. We're going to have to support that in a down time. There are a little over a thousand prospective members. We have to hit a high percentage of them. We need several hundred." ■

## Pep Boys Sells A Billion, AutoZone Sells More Stock

An early statement from Pep Boys, Philadelphia, reported that the chain had sales of $1,001,508,000 in 1991, up 13% from $884.7 million in 1990. Earnings will not be reported until late March. Pep Boys also noted comparable sales increases of 7% in merchandise, 15% in tires, and 7% in service revenues for the final quarter of 1991. Pep Boys operates 337 stores in 18 states.

At AutoZone, Memphis, the chain announced KKR Associates (an affiliate of Kohlberg Kravis Roberts & Company), which owns about 59% of AutoZone, will sell 4 million of its shares. At the same time AutoZone chairman J.R. Hyde will sell 725,000 of his shares. As we go to press, AutoZone stock is selling at $40 a share. The company operates 619 stores in 20 states.

PACCAR, Inc., Bellevue, WA, which owns Grand Auto and Al's Auto, announced that 1991 sales slumped by about $425 million to $2,159,627,000. Earnings, likewise declined $8.5 million to $55,157,000. As always, PACCAR did not break out the automotive parts segment but said, "For 1991, auto parts segment operating results continued *below breakeven*, but showed significant improvement over 1990 (our italics). We estimated 1991 PACCAR sales at $226 million. ■

PROGRAMMED DISTRIBUTION

## Bumper To Bumper And All-Pro Team Up Under AMA Flag

Long time competitors will soon become friends as the Bumper to Bumper, Nashville, TN, and All-Pro, Andalusia, AL programmed distribution groups merged forces in January to form the Automotive Marketing Association (AMA). AMA will have 28 WD members, 57 distribution centers, and more than 1,550 jobbers in 40 states. Combined sales will total almost $700 million.

Before the merger, All-Pro had 17 WDs serving 450 jobbers in 26 states while Bumper to Bumper had 12 WDs serving some 1,100 stores in 28 states and Canada.

"We realized that in order to become one of the top five groups, we had to work together, we had to all make some sacrifices. We couldn't do it on our own," said Mark Wiggins, formerly All-Pro president and the new AMA executive director. While it's not clear how the two groups will work out overlapping territories yet, the groups realize, Wiggins said, "our competition is *not* Bumper to Bumper or All-Pro, Our competition is really NAPA, Big A, Parts Plus, and some of the others."

Along with Wiggins, Steve Synnott, Bumper to Bumper director of marketing, will serve as director of member services responsible for marketing. Chuck Rider (AEA, Charlotte, NC) will become chairman and Beryle Blanchard

# CONSUMER AUTOMOTIVE REPAIR STUDY

by **Phil Katcher,**
Business Editor

Looking at vehicle maintainers—the ultimate aftermarket customers—by their DIY skill levels.

If you sell automotive parts, accessories, or chemicals the final, end user will be the vehicle maintainer. So, even if most of your business is wholesale, you've got to know about that vehicle maintainer because your customer has to reach the maintainer. And, if you can provide that extra bit of service by giving your customer help and understanding in reaching that maintainer, you just may make extra sales.

There are basically four types of vehicle maintainers, non-DIYers, light DIYers, medium DIYers, and dedicated DIYers.

### Non-DIYer

The non-DIYer turns to the professional installer for virtually every job on his or her vehicle. In all, 20% of all vehicle maintainers define themselves as "non-DIYers."

By gender, 67% of all non-DIYers are female.

As well, the percentage of vehicle maintainers who are non-DIYers increases, generally, as the maintainers grow oldere. Only 3% of all maintainers less than 25-years-old are non-DIYers. This percentage grows to 9% of maintainers aged between 25 and 34 years of age. In all, 18% of non-DIYers are aged between 45 and 54. And the largst single group—over half—of non-DIYers are 55-years-old or older. This is does not bode well for the retail aftermarket, since the population of America as a whole is aging. As the population ages, obviously the number of non-DIYers grows, too.

The bulk of non-DIYers are found at either end of the annual household income spectrum. In all, 21% of non-DIYers make less than $20,000 in annual household income. Only 12% of non-DIYers make between $20,000 and $30,000, while 17% of non-DIYers make between $30,000 and $40,000. The largest group of non-DIYers, 32%, make over $40,000 in annual household income.

Non-DIYers have all levels of education. In all, 12% didn't receive a high school degree; 30% graduated from high school; 24% have some college or vocational schooling; and a third have a college degree.

Three quarters of all non-DIYers are responsible for maintaining only one vehicle. Another 19% has two vehicles, while 6% has three or more vehicles.

### Light DIYers

Light DIYers will handle those simple tasks that many automotive people don't even really consider DIY work. They'll do things like top off oil, but not change oil; wash the car, but not detail it; and put a floor mat in, but not apply body repair products to a rotted out floor.

Of the entire vehicle maintaining population, 38% say they are "light DIYers."

Over half—58%—of those calling themselves light DIYers are female.

By age groups, light DIYers tend to bunch in the middle years. Only 11% of the light DIYers are under than 25-years-old. Another 26% are between 25 and 34 years in age. Of light DIYers, 22% are between 35 and 44 years of age. The percentage of light DIYers falls in the case of those 45 to 55 to 17%. Finally, 24% of light DIYers are over 55.

By income groups, however, light DIYers are found more at either end of the spectrum. Among light DIYers, almost a quarter (23%) have annual household incomes of under $20,000. Another 16% have annual household incomes of $20,000 to $30,000. Virtually the same percentage have annual household incomes of $30,000 to $40,000. And, the largest group, 35%, have annual household incomes of over $40,000.

Light DIYers are, as a group, the best educated of all vehicle maintainers. In all, 35% are college graduates, while another 26% at least attended college or a post-high school technical or vocational school. Another 31% graduated from high school.

As with non-DIYers, most light DIYers tend

## VEHICLE MAINTAINERS: DIYERS OR NOT?

We determined that 86% of households in the country with telephones have a vehicle registered in them. Of that, 74% of those who answered the phone are responsible for the maintainence of at least one vehicle in that household. Then we asked them if they were non-DIYers, light DIYers (they would top off oil), medium DIYers (they would change oil), or dedicated DIYers (they would replace the manifold).

**MAINTAINERS**

| DIY type | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| | 20% | 38% | 25% | 16% |

## THE HOUSEHOLD INCOME OF VEHICLE MAINTAINERS

As defined by how much automotive DIY work they say they do.

**MAINTAINERS**

| Household Income | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| -$10K | 9% | 9% | 7% | 6% |
| $10-20K | 12 | 15 | 11 | 14 |
| $20-30K | 12 | 16 | 19 | 21 |
| $30-40K | 17 | 16 | 17 | 20 |
| $40-50K | 12 | 12 | 14 | 14 |
| + $50K | 20 | 23 | 23 | 21 |

** Does not add up to 100% due to refusals to answer.

## THE EDUCATION OF VEHICLE MAINTAINERS

As defined by how much automotive DIY work they say they do.

**MAINTAINERS**

| Education | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Under HS | 12% | 9% | 9% | 12% |
| High School | 30 | 31 | 32 | 40 |
| Some college | 24 | 26 | 28 | 27 |
| College grad | 33 | 35 | 30 | 21 |

** Does not add up to 100% due to refusals to answer.

to have few vehicles to maintain. In all, 62% have only one vehicle, while another 28% have two vehicles. The rest have three or more vehicles.

### Medium DIYers

Medium DIYers will attempt fairly easy automotive repair and maintenance jobs. They'll change the oil, change filters, or tune-up a rough-running vehicle. In all, a quarter of all vehicle maintainers define themselves as "medium DIYers."

Once one gets to this DIY-ability level, one

## HOURS SPENT ON VEHICLE MAINTENANCE

We asked people if they were non-DIYers, light DIYers, medium DIYers, or dedicated DIYers. Then we asked them how many hours they spend in an average month performing repairs or maintenance–which could mean taking it to a shop for repairs on their vehicles. From this, we can construct a profile of the average DIYer in each category by how many hours a month they spend on vehicle maintenance.

**MAINTAINERS**

| Hrs/Month | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| None | 70% | 44% | 12% | 4% |
| Under 1 hour | 8 | 13 | 12 | 6 |
| 1-5 hours | 17 | 33 | 62 | 59 |
| 6-10 hours | 2 | 8 | 8 | 18 |
| Over 11 hours | 1 | 2 | 4 | 13 |

** Does not add up to 100% due to refusals to answer.

## THE AGE OF VEHICLE MAINTAINERS

As defined by how much automotive DIY work they say they do.

**MAINTAINERS**

| Age | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Under 18 | * | 1% | 3% | 2% |
| 18-24 | 3% | 10% | 11% | 10% |
| 25-34 | 9 | 26 | 30 | 32 |
| 35-44 | 18 | 22 | 23 | 26 |
| 45-54 | 16 | 17 | 13 | 16 |
| 55-64 | 21 | 12 | 12 | 10 |
| Over 65 | 31 | 13 | 7 | 5** |

* Cell too small to measure
** Does not add up to 100% due to refusals to answer.

## THE SEX OF VEHICLE MAINTAINERS

As defined by how much automotive DIY work they say they do.

**MAINTAINERS**

| Sex | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Male | 33% | 42% | 72% | 95% |
| Female | 67 | 58 | 28 | 5 |

finds more men than women maintainers. In all, almost three quarters of all vehicle maintainers (73%) who say they are medium DIYers are also men.

Again, by age groups, medium DIYers tend to cluster towards the middle of the age scale. Only 14% of medium DIYers are under 25-years-old. The largest single group—at 30% almost a third—of medium DIYers are 25 to 34 years of age. Young men are still in that big

## CARS OWNED BY VEHICLE MAINTAINERS

As defined by how much automotive DIY work they say they do.

**MAINTAINERS**

| Make | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Acura | 2% | 1% | * | * |
| BMW | 1 | 1 | 1% | 1% |
| Buick | 6 | 4 | 4 | 3 |
| Cadillac | 8 | 4 | 3 | 4 |
| Chevrolet | 13 | 12 | 15 | 20 |
| Chrysler | 4 | 3 | 3 | 7 |
| Dodge | 5 | 4 | 6 | 4 |
| Jeep/Eagle | * | 1 | 1 | 2 |
| Ford | 12 | 15 | 17 | 20 |
| Honda | 3 | 9 | 5 | 4 |
| Hyundai | * | 1 | 1 | 1 |
| Lincoln | 4 | 1 | 2 | 1 |
| Mazda | 2 | 2 | 3 | * |
| Mercury | 4 | 3 | 2 | 3 |
| Nissan | 2 | 6 | 4 | 2 |
| Oldsmobile | 11 | 8 | 7 | 5 |
| Plymouth | 2 | 3 | 2 | 3 |
| Pontiac | 5 | 6 | 4 | 5 |
| Subaru | 2 | 1 | 2 | * |
| Toyota | 8 | 7 | 6 | 4 |
| Volkswagen | 2 | 3 | 4 | 4 |

* Cell too small to measure

group of DIYers. The figure drops to just under a quarter (23%) of all medium DIYers who are between 35 and 44 years of age. The lowest single percentage of any group is to be found among medium DIYers who are 45 to 55 years of age or older at 13%. Finally, only 20% of all medium DIYers are aged 55-years-old or older.

The largest single concentration of medium DIYers by annual household income is found at the high end income level. Well over a third (37%) of all medium DIYers make over $40,000 in annual household income. The other medium DIYers are fairly evenly found in other annual household income levels. Of them, 18% make less than $20,000; 19% make between $20,000 and $30,000; and 17% make between $30,000 and $40,000.

Well over half of all the medium DIYers have at least some college education. A total of 30% are college graduates, while 28% attended a post-high school technical or vocational school or college. Some 32% graduated from high school.

The percentage of medium DIYers with more than one vehicle to maintain is larger than with non- and light DIYers. In all, 42% of medium DIYers have only one vehicle to maintain, while almost the same number (40%) have two vehicles. Of medium DIYers, 18% have three or more vehicles to maintain.

### Dedicated DIYers

If you're an automotive aftermarket retailer, you already know the dedicated DIYer. He's the guy—most are male—who takes that old

## AUTOMOTIVE PRODUCTS PURCHASED OVER THE YEAR

We asked people who maintained a vehicle what they bought or had professionally installed over the past year.

**MAINTAINERS**

| Products | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Motor oil | 75% | 84% | 64% | 65% |
| Filters | 64 | 78 | 69 | 66 |
| Tune-up parts | 43 | 52 | 55 | 52 |
| Antifreeze | 37 | 42 | 47 | 43 |
| Brake system parts | 24 | 39 | 43 | 41 |
| Batteries | 26 | 35 | 35 | 33 |
| Wipers | 25 | 34 | 34 | 32 |
| Wax/polish | 28 | 29 | 34 | 29 |
| Engine system parts | 14 | 22 | 30 | 39 |
| Lighting system parts | 14 | 24 | 30 | 33 |
| Exhaust system parts | 13 | 22 | 29 | 28 |
| Cooling system parts | 9 | 18 | 25 | 26 |
| Other appearance chemicals | 11 | 21 | 20 | 17 |
| Gas additives | 5 | 21 | 21 | 25 |
| Fuel system parts | 11 | 15 | 22 | 29 |
| Tire cleaning products | 7 | 20 | 20 | 20 |
| Starting and charging parts | 8 | 14 | 23 | 27 |
| Shocks/struts | 8 | 14 | 18 | 27 |
| Body repair products | 12 | 12 | 19 | 22 |
| Interior cleaning products | 7 | 15 | 15 | 16 |
| Front end parts | 7 | 10 | 14 | 24 |
| Electronic accessories | 6 | 11 | 14 | 14 |
| Books/manuals | 2 | 8 | 13 | 23 |
| Custom wheels/ accessories | 4 | 9 | 12 | 8 |
| Seat Covers | 3 | 3 | 8 | 10 |
| Floor mats | 2 | 9 | 8 | 12 |

## AUTOMOTIVE PRODUCTS PURCHASED

We asked people if they were non-DIYers, light DIYers, medium DIYers, or dedicated DIYers. Then we asked them how many automotive products they purchased or had professionally installed during the previous year.

**MAINTAINERS**

| Products | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| None | 19% | 7% | 9% | 15% |
| 1-2 | 33 | 21 | 20 | 22 |
| 3-5 | 36 | 45 | 37 | 23 |
| 6-8 | 2 | 6 | 10 | 19 |
| 9 or more | 14 | 18 | 19 | 31 |

** Does not add up to 100% due to rounding.

## TYPE OF STORES VEHICLE MAINTAINERS PATRONIZE

We asked where vehicle maintainers bought their parts, chemicals, and accessories, as defined by how much automotive DIY work they say they do.

**MAINTAINERS**

| Store type | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Auto parts | 14% | 37% | 45% | 45% |
| Dept. store | 4 | 17 | 19 | 25 |
| Discount | 6 | 37 | 40 | 35 |
| Gas station | 5 | 15 | 17 | 15 |
| Hardware | 3 | 14 | 17 | 16 |
| Drug store | 1 | 5 | 5 | 7 |
| Supermarket | 3 | 14 | 13 | 12 |
| Convenience | * | 11 | 10 | 13 |
| Car dealer | 1 | 10 | 17 | 23 |
| Specialty | 5 | 18 | 28 | 27 |
| Junkyard | * | * | 3 | 2 |

* Cell too small to measure
** Does not add up to 100% due to multiple mentions.

### STUDY METHODOLOGY

This year's Consumer Automotive Repair Study (CARS) was made of everyone, both DIYers and non-DIYers who maintains vehicles—the entire aftermarket customer base. The purpose is to show where the DIY market fits in the overall vehicle maintainer world.

To do this study, as in the previous eight studies, we retained the services of Chilton Research Services, one of the country's leading market research firms. Its interviewers called 1,812 households across the country—139 more than last year—over a month-long period, asking each respondent if anyone in the household owned one or more vehicles. In all, vehicles were owned in 1,538 households.

The researchers then asked if the person on the phone were responsible for maintaining any of the vehicles. If the person reached on the phone did not qualify as a vehicle maintainer, the interview was ended.

The remainder were then asked to participate in CARS. In all, 1,179 individuals who were responsible for maintaining a vehicle cooperated with Chilton Research. These individuals were read a list of automotive products. If they purchased any of these products, they were asked a set of questions about their buying habits for those products. As well, we asked who installed the product—a DIYer or a professional—and why the maintainer chose that method of installation.

The answers that the interviewers got were "top-of-mind" answers. Many questions were open-ended, meaning that the interviewers did not provide a list of possible answers for a respondent to select from. Instead, the interviewers took down the respondent's first answer. Market research professionals feel that lists of suggested answers tend to prejudice the responses.

It must be noted that in no way are the figures produced in this study comparable with previous CARS studies which concentrated on DIYers only. However, as in previous studies, this study is nationally projectable, using weighted numbers. It gives an accurate picture of the ultimate consumer for the entire aftermarket—the vehicle maintainer.

Corvette apart and puts it back together over a weekend for little more than the fun of it. Although only 16% of all vehicle maintainers say they're dedicated DIYers, they make up the bulk of the sales to most aftermarket retailers and retail jobbers.

Only a handful (5%) of all vehicle maintainers who say they're "dedicated DIYers" are female.

The bulk of dedicated DIYers are found in the young adult age groups, although not the very young vehicle maintainer group. Only 11% of dedicated DIYers are in the under 25 age group. Indeed, the big groups of dedicated DIYers are between 25 and 44 years of age. In all, 32% of all dedicated DIYers are between 25 and 34, while another 27% are between 35 and 44 years of age. Then the numbers of dedicated DIYers fall as the population ages. Only 16% of dedicated DIYers are between 45 and 54 years of age. Almost the same percentage of dedicated DIYers (15%) are 55-years-old or older.

Repairing and rebuilding cars, light trucks, and utility vehicles can be an expensive hobby. Therefore, it's no surprise to find dedicated DIYers at the high end of the income spectrum. In all, 35%—well over a third—of all dedicated DIYers have an annual household income of over $40,000. The rest of the dedicated DIYers are pretty well evenly spread in income groups. Of them, 20% make under $20,000 in annual household income; 21% make between $20,000 and $30,000; and 20% make between $30,000 and $40,000.

In terms of education, the largest single group of dedicated DIYers have only a high school diploma at 32%. Another 30% have college degrees, while 26% attended college or a post-high school technical or vocational school.

If your vehicle is also your hobby, as is the case with many dedicated DIYers, often you'll need two or more vehicles. The one that takes the work, be it a sports car or an old utility vehicle, is often a weekend warrior. Another, dependable vehicle is often the daily commuter vehicle, and that doesn't need or receive much automotive DIY work.

Therefore, it's not surprising that almost half (46%) of all dedicated DIYers own three or more vehicles. Another 37% have two vehicles.

Finally, for the purpose of this study, it should be mentioned that around 1% of all vehicle maintainers didn't know how to define themselves in terms of automotive DIY. ■



(Circle # 12 on Product Information Card ♦)

CONSUMER AUTOMOTIVE CARS REPAIR STUDY

# Wipers

The seventh most purchased products on our survey were windshield wipers, with 32% of all maintainers buying them over the previous year.

In the old days of full-service gasoline stations, most wiper purchases were made at gas stations when attendants recommended replacing them on streaky windshields. Today, only 12% of those who bought wipers got them at gas stations, while 43% went to an auto parts store for wipers. Another 13% went to a discount store, while 10% went to a specialty installer, and 9% went back to the car dealer.

At 62%, most wiper purchasers either put them on themselves or had another DIYer do the job. Almost the same number, 11%, of those who bought wipers at gas stations had gas station attendants install them. There was a wide spread in wiper DIYers among men, of whom 66% installed their own wipers; and women, of whom only 21% also installed them.

Among those who installed their own wipers, 60% of the women said they did it because it was a simple job, while only 32% of the men gave that same reason. Another third of women installers vs. 18% of male installers said they did it because they could "do it myself." On the other hand, 32% of men said they did it themselves to save money, while only 26% of women gave that reason. Overall, among all maintainers, 37% said they did it themselves because it was easy, while 31% said they did it to save money.

National advertising pays in the wiper area. In all, only 23% said they specified a brand of wiper, but 10% asked for a nationally advertised brand. Some 3% said they asked for an OE manufacturer's brand, while the rest obviously didn't know anything about brands since they quoted inappropriate brand names, such as one individual who cited the name of a well-known wax and polish manufacturer.

Just over a quarter (27%) of the buyers who didn't specify a brand said they didn't know anything about wiper brands. Another 18% said they didn't believe there was a difference between brands, while 13% simply accepted whatever brand the professional technician installed. Jobbers have to sell that technician to move wipers and blades.

## WHERE MAINTAINERS BOUGHT WINDSHIELD WIPERS

The automotive parts store is still the most popular place for wipers and blades purchases among more capable DIYers.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | 30% | 35% | 49% | 62% |
| Discount store | 4 | 14 | 14 | 21 |
| Gas station | 31 | 12 | 9 | * |
| Specialty installer | 11 | 12 | 10 | * |
| Dept. store | 3 | 2 | 2 | 9 |

## WHO INSTALLS WINDSHIELD WIPERS

Dedicated DIYers are far more likely to install their own wipers and blades than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | 19% | 53% | 76% | 100% |
| Gas station | 30 | 11 | 9 | * |
| Car dealership | 14 | 11 | 3 | * |
| Auto parts store | 14 | 6 | 2 | * |
| Specialty installer | 7 | 12 | 10 | * |

## HOW MANY MAINTAINERS SPECIFY WIPERS BY BRAND NAME

DIYers are more brand conscious, although most maintainers don't specify brands despite consumer advertising.

**MAINTAINERS**

| | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 13% | 20% | 24% | 40% |
| Don't specify | 87 | 80 | 76 | 60 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know brands | 33% | 28% | 27% | 15 |
| No difference | 29 | 12 | 13 | 31 |
| Technician installed | 4 | 23 | 8 | * |
| Cheapest around | * | 2 | 4 | 10 |

## WHAT TYPE OF VEHICLE THEY BOUGHT WIPERS FOR

Three quarters of all vehicle maintainers bought wipers and blades for their cars. But, non-DIYers bought more wipers and blades for cars than did dedicated DIYers by a large margin.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 87% | 72% | 71% | 48% |
| Light truck | 6 | 10 | 11 | 22 |
| Van | * | 5 | 7 | 14 |
| Utility vehicle | * | 6 | 3 | 9 |

## WHY DIYERS INSTALL THEIR OWN WINDSHIELD WIPERS

Most DIYers install their own wipers and blades because it's such an easy job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Simple to do | * | 37% | 46% | 29% |
| Can do it | * | 30 | 8 | 27 |
| To save money | * | 21 | 27 | 46% |
| Needed the job done | * | 18 | 10 | 18 |
| No time | * | * | 3 | 15 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN WINDSHIELD WIPERS

Most of those other than dedicated DIYers who didn't install their own wipers and blades don't know how to do it.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 62% | 42% | 19% | * |
| Car already in for service | 7 | 10 | 12 | * |
| Too busy | 7 | 14 | 15 | * |
| Don't like doing it | 11 | 5 | 4 | * |
| Don't enjoy | 12 | 11 | 5 | * |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Paint & BODY REPAIR

In hard times where people aren't buying new cars, paint and body repair products are sure sellers. In all, 16% of vehicle maintainers said they'd bought this sort of product during the past year.

The auto parts store is the place where the largest single group of maintainers head for these products. Almost a third of all body repair product buyers (29%) bought these products at auto parts stores. Another 23% went to an independent garage; 21% to a car dealer; and 10% to a specialty installer. In fact, looking at specialty installers such as body shops, the largest groups of body repair products from these outlets are maintainers who are less than 25-years-old; making under $30,000 or less in annual household income; medium DIYers; and maintaining one or two cars.

When, however, one looks at the 10% who had body repair products applied at specialty installers, one sees some different demographic groups. While those under 25-years-old patronized these outlets in a percentage larger than the overall average, so did those aged over 45. Those making $20,000 or less in annual household income were still big specialty installer outlet patrons. Abuth the same percentage of medium DIYers had these outlets put the products on that light DIYers. And the largest group of vehicle maintainers had two vehicles for which they were responsible.

Traditionally, there are two groups of body repair product buyers—those with major damage who return the vehicle to a body shop or new car dealer to have repairs done, and those with minor damage who buy spray paint or a rust removal and replacement kit for small rust spots or dings. In the first case, the buyer simply took whatever brand the technicial used. Indeed, just over a third (34%) of all body repair product buyers who didn't specify a brand said that they took whatever "the mechanic installed." In the second group, buyers acquired what they thought matched their car's paint job. Among those who specified brands, 41% said they bought the OE maker's paint. However, only 1% of those who didn't specify brand said they just picked the color that matched, while another 33% said they had "no knowledge of product brands."

## WHO INSTALLS BODY REPAIR PRODUCTS/PAINT

Dedicated DIYers are far more likely to install their own body repair products and paint than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| DIYer | * | 17% | 30% | 54% |
| Car dealership | 37% | 18 | 18 | 14 |
| Independent garage | 51 | 27 | 21 | 14 |
| Specialty installer | * | 14 | 15 | 5 |
| Body shop | * | 8 | 4 | 5 |

## WHY DIYERS INSTALL THEIR OWN BODY REPAIR PRODUCTS/PAINT

Most DIYers install their own body repair products and paint to save money.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| To save money | * | 63% | 58% | 38% |
| Can do it | * | * | 19 | 20 |
| Simple to do | * | 37 | * | 18 |
| Enjoy it | * | * | * | 37 |
| Saved time | * | * | 19 | * |

## HOW MANY MAINTAINERS SPECIFY BODY REPAIR PRODUCTS/PAINT BY BRAND NAME

Dedicated DIYers are the only ones who really specify body repair products and paint by brand name.

**MAINTAINERS**

| DIYer | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Do specify | 14% | 28% | 19% | 54% |
| Don't specify | 86 | 72 | 82 | 46 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question; dedicated DIYers don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Technician installed | 47% | 45% | 26% | 19% |
| Don't know brands | 48 | 21 | 28 | 52 |
| No difference | * | * | 17 | 11 |
| No reason | * | 5 | * | * |

## WHAT TYPE OF VEHICLE THEY FOR WHICH THEY BOUGHT BODY REPAIR PRODUCTS/ PAINT

Three quarters of all vehicle maintainers bought body repair products and paint for their cars. Non-DIYers bought more body repair products and paint for cars than did dedicated by only a slight margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Cars | 89% | 80% | 63% | 77% |
| Light truck | 11 | 10 | 34 | 18 |
| Van | * | 11 | 4 | * |
| Utility vehicle | * | * | * | 5 |

## WHERE MAINTAINERS BOUGHT BODY REPAIR PRODUCTS/ PAINT

The automotive parts store is still the most popular place for body repair products and paint purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Auto parts store | 6% | 10% | 40% | 54% |
| Car dealership | 37 | 22 | 18 | 14 |
| Independent garage | 44 | 26 | 14 | 13 |
| Specialty installer | * | 15 | 12 | 9 |
| Body shop | 7 | 12 | 4 | 5 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN BODY REPAIR PRODUCTS/ PAINT

Most of those who didn't install their own body repair products and paint say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Don't know how | 67% | 72% | 87% | 63% |
| Too busy | 25 | 11 | 4 | * |
| Don't have tools | 6 | 19 | * | 9 |
| Don't like doing it | 14 | 4 | 6 | * |
| Want it done right | * | * | * | 10 |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Tune-up PARTS

Tune-up products are the third most purchased product category of all we studied. In all, over half (51%) of all vehicle maintainers purchased some sort of tune-up product such as spark plugs, control modules, or points, during the previous year.

Tune-up product purchase levels grow with education, experience, and affluence. The highest levels of tune-up product purchasers, by demographic categories, were among those who are male (57%), 35 to 44 years old (59%), making over $40,000 in annual household income (64%), and responsible for two vehicles (61%).

Almost a quarter of all tune-up product buyers return to the dealer to buy these products. Yet, auto parts stores are overall the most popular purchase place, with 36% of all purchasers buying them at these stores. Despite the growth of specialty installer outlets in this product category, overall only 8% bought the products at these outlets. In all, 9% of all male tune-up product buyers went to specialty installers, vs. 6% of female buyers. On the other hand, 42% of men went to auto parts stores compared to 28% of female buyers.

Just over a quarter (26%) of all tune-up product buyers specified a brand of tune-up product. Just over a third of men specified a brand compared to only 13% of female tune-up products buyers. As well, the percentage of those who specified brands fell off as the maintainers grew older. Among those under 25 years old, 40% specified a brand; 29% of those 25 to 34 did so; 28% of those 35 to 44 did; 24% of those 45 to 54 did; and 16% of those over 55 years old specified a brand.

Of those who didn't specify a brand, most (41%) simply accepted what the professional technican installed. Here's an area where a jobber can move products simply by getting them into the hands of the professional installers. Otherwise, almost a quarter (24%) said they didn't know the brands, while 10% said there was no difference. More women (41%) than men (10%) said they didn't know the brands.

In today's economy it's no surprise to find that over half (59%) of those who installed their own tune-up parts did so to save money.

## WHERE MAINTAINERS BOUGHT TUNE-UP PARTS

The automotive parts store is still the most popular place for tune-up parts purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | 9% | 25% | 52% | 68% |
| Car dealership | 35 | 27 | 21 | 12 |
| Independent garage | 25 | 20 | 10 | 2 |
| Specialty installer | 5 | 10 | 8 | 7 |
| Gas station | 16 | 9 | 2 | 3 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question;
Non-DIYers don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Technician installed | 31% | 50% | 43% | 11% |
| Don't know brands | 45 | 21 | 14 | 6 |
| No difference | 5 | 6 | 16 | 27 |
| No reason | 2 | 2 | * | 2 |

* Cell too small to measure.

## HOW MANY MAINTAINERS SPECIFY TUNE-UP PARTS BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 5% | 18% | 28% | 62% |
| Don't specify | 95 | 82 | 72 | 38 |

## WHO INSTALLS TUNE-UP PARTS

Dedicated DIYers are far more likely to install their own tune-up parts than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | * | 5% | 36% | 81% |
| Car dealership | 35 | 27 | 21 | 4 |
| Independent garage | 25 | 24 | 11 | 2 |
| Specialty installer | 7 | 10 | 11 | 6 |
| Gas station | 15 | 9 | 2 | 3 |

* Cell too small to measure accurately.

## WHAT TYPE OF VEHICLE THEY BOUGHT TUNE-UP PARTS FOR

Three quarters of all vehicle maintainers bought tune-up parts for their cars. But,
Non-DIYers bought more tune-up parts for cars than did dedicated by a large margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 90% | 82% | 65% | 66% |
| Light truck | 2 | 9 | 17 | 13 |
| Van | 6 | 5 | 5 | 3 |
| Utility vehicle | 2 | 1 | 5 | 2 |

## WHY DIYERS INSTALL THEIR OWN TUNE-UP PARTS

Most DIYers install their own tune-up parts to save money.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| To save money | * | 42% | 72% | 51% |
| Can do it | * | 15 | 21 | 34 |
| Simple to do | * | 25 | 17 | 7 |
| Enjoy it | * | * | 11 | 15 |
| Needed the job done | * | 17 | 11 | 9 |

* This response not given by anyone in this group.

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN TUNE-UP PARTS

Most of those other than dedicated DIYers who didn't install their own tune-up parts say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 73% | 63% | 46% | 15% |
| Too busy | 20 | 25 | 17 | 11 |
| Don't have tools | 5 | 8 | 12 | 20 |
| Don't like doing it | 9 | 9 | 7 | * |
| Want it done right | 5 | 4 | 8 | 22 |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Additives

While additives are easy to use and promise to restore a vehicle's performance, getting consumers to understand their value has always been a problem. The result is that only 18% of all vehicle maintainers have bought additives over the past year, putting the product category squarely in the middle of the list of product categories.

The fact that people who do pay attention to their vehicles also use additives should indicate that the products actually are of value. In all, a quarter of dedicated DIYers bought additives compared to only 5% of non-DIYers. A higher percentage of people maintaining three or more vehicles buy additives than those with only one vehicle.

Of those who bought additives, 37% bought them in auto parts stores; another 23% in discount stores; and 20% in gas stations. Then, they took the additives home where 71% of them themselves and 14% of friends or relatives poured the additive in. Only 15% didn't put in their own additives and a quarter of them said they didn't know where to put it. In all, 31% of women non-DIYers gave ignorance as their excuse, compared to only 12% of men. Another 13% of all non-installers didn't have time to do it themselves; 46% of this group were men.

Among the majority who poured in their own additives, 41% said that they did so simply because it was easy to do, while a quarter said they wanted to save money by doing it themselves. Twice as many men as women did it to save money, while only 6% more men than women did it because it was simple.

Just over half (52%) said they wanted a specific additive brand, although only 8% of them didn't know what that brand was called when asked. Men, at 54%, tended to ask for a specific brand more than women, at 48%. Those who make over $40,000 in annual household income asked for a specific brand more often, at 57%, than those making less than $20,000 at 51%.

When asked why they didn't ask for a specific brand, almost a third (31%) said there was no difference between additives on the market. The second largest group at 14% said they didn't know what brands were out there or anything about them.

## WHO INSTALLS ADDITIVES

Dedicated DIYers are far more likely to install their own additives than other DIYers, although even over a third of all non-DIYers buy additives to have someone other than a professional use.

**MAINTAINERS**

| Installer | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| DIYer | 35% | 84% | 83% | 100% |
| Gas station | 49 | * | 3 | * |
| Car dealership | 16 | 7 | 3 | * |
| Auto store | * | 2 | 3 | * |
| Specialty installer | * | 4 | * | * |

## HOW MANY MAINTAINERS SPECIFY ADDITIVES BY BRAND NAME

DIYers are only slightly more brand conscious.

**MAINTAINERS**

| | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Do specify | 51% | 50% | 49% | 59% |
| Don't specify | 49 | 50 | 51 | 41 |

## WHERE MAINTAINERS BOUGHT ADDITIVES

The automotive parts store is still the most popular place for additive purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Auto parts store | * | 39% | 39% | 40% |
| Gas station | 49 | 15 | 27 | 16 |
| Discount store | 19 | 24 | 24 | 20 |
| Car dealership | 16 | 4 | 7 | 9 |
| Dept. store | * | 2 | * | 8 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Don't know brands | 68% | 13% | 15% | * |
| No difference | * | 25 | 20 | 72% |
| Technician installed | * | 15 | 7 | * |
| Cheapest | * | * | 12 | * |

## WHAT TYPE OF VEHICLE THEY BOUGHT ADDITIVES FOR

Three quarters of all vehicle maintainers bought additives for their cars. But, non-DIYers bought more additives for cars than did dedicated DIYers by a large margin.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Cars | 84% | 82% | 60% | 68% |
| Light truck | 16 | 4 | 20 | 8 |
| Van | * | 7 | 4 | 12 |
| Utility vehicle | * | * | * | * |

## WHY DIYERS INSTALL THEIR OWN ADDITIVES

Most DIYers install their own additives because the job is simple and easy to do.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Simple to do | * | 49% | 48% | 24% |
| To save money | * | 11 | 29 | 41 |
| Can do it | * | 11 | 9 | 24 |
| Needed the job done | * | 6 | 19 | 17 |
| Be sure it's done right | * | 3 | * | 12 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN ADDITIVES

Most of those who didn't install their own additives say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Don't know how | 49% | 29% | * | * |
| Too busy | 16 | 13 | 12 | * |
| Want it done right | * | 7 | 13 | * |
| Car being service | * | 6 | 11 | * |
| Don't like doing it | * | 17 | * | * |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Floor MATS

There's virtually a tie for most popular places to buy floor mats between auto parts stores, where 31% bought, and discount stores, where 27% bought. Men shop for mats at discount stores and auto parts stores equally (29% each), while women, at 35%, tend to prefer auto parts stores, in an unusual gender switchover. Another 20% buy their mats at their car dealers, and this percentage stays the same with men as women.

There can't be much of an easier product to put in than floor mats. After all, the buyer simply pulls them off the packaging and places them on the car floor. Even so, some 15% of all buyers don't put them in themselves or have a friend or relative do so for them. In fact, not one person who said they were a "non-DIYer" put their own floor mats down.

About a tenth of all floor mat buyers have them put in by the car dealer, leaving another 5% who go to discount stores, specialty installers, independent garages, and upholstery shops or carpet stores.

When asked why, a tenth of all floor mat buyers who didn't install their own mats said that they got them new with the car. Another tenth said they didn't like doing the job, while 12% said they were too busy. Some 6% said their car was already being worked on, while a surprising 6% said they lacked the "proper tools," whatever they may be.

Floor mat buyers either don't know about or care about different brands. Only 22% specified a brand of floor mat. And, of them, 64% wanted the OE car maker's floor mats while 5% specified a brand that was cheapest or on sale. Interestingly, a higher percentage of women to men (27% vs. 19%) said that they specified a floor mat brand.

One may suspect that the reason is that most buyers simply go into an outlet and buy the right fit and color floor mat. Not necessarily. Indeed, overall only 3% of all floor mat buyers who didn't specify brand said they bought a mat with the right color or fit. Another 20% said that there is no difference between brands, while 19% said they didn't know the brands available. Only 1% admitted to buying floor mats because they were cheap or on sale.

## WHAT TYPE OF VEHICLE THEY BOUGHT FLOOR MATS FOR

Three quarters of all vehicle maintainers bought floor mats for their cars. But, non-DIYers bought more floor mats for cars than did dedicated by a large margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 100% | 86% | 68% | 63% |
| Light truck | * | 3 | 15 | 12 |
| Van | * | 5 | 9 | 8 |
| Utility vehicle | * | 7 | 9 | 9 |

## WHY DIYERS INSTALL THEIR OWN FLOOR MATS

Most DIYers install their own floor mats because it's easy to do.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Simple to do | * | 51% | 75% | 40% |
| Can do it | * | 23 | 14 | 17 |
| To save money | * | 20 | 13 | 21 |
| Needed the job done | * | 3 | 9 | 8 |
| See it's done right | * | 3 | * | 13 |

## WHO INSTALLS FLOOR MATS

Who doesn't install floor mats? Very, very few.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | 26% | 83%* | 90% | 95% |
| Car dealership | 44 | 14 | 5 | * |
| Discount store | 33 | * | 5 | * |
| Carpet shop | * | * | * | 5 |
| Specialty installer | * | 3 | * | * |

## WHERE MAINTAINERS BOUGHT FLOOR MATS

Discount stores virtually tie with automotive parts stores as the most popular place for floor mats purchases.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Discount store | 33% | 20% | 34% | 32% |
| Auto parts store | 26 | 26 | 39 | 34 |
| Car dealership | 44 | 20 | 23 | 12 |
| Dept. store | * | 15 | * | 9 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands don't know anything about the different brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know brands | 59% | 15% | 22% | 17% |
| No difference | * | 25 | 23 | 11 |
| Technician installed | * | 3 | * | 6 |
| Correct color | * | 6 | * | * |

## HOW MANY MAINTAINERS SPECIFY FLOOR MATS BY BRAND NAME

DIYers are apparently less brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 44% | 23% | 13% | 26% |
| Don't specify | 56 | 77 | 87 | 74 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN FLOOR MATS

Most of those other than dedicated DIYers who didn't install their own floor mats say they didn't have time to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Too busy | * | 9% | 50% | * |
| Car already in for service | * | * | 50 | * |
| Don't have tools | * | * | * | 100% |
| Free service | 56% | 9 | * | * |
| New car | * | 17 | * | * |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE CARS REPAIR STUDY

# Protectants

In all, 18% of vehicle maintainers bought some sort of appearance chemical such as a protectant or vinyl cleaner during the past year. Interestingly, those under 25-years-old made up a major market for appearance chemicals, with 32% of those in that group buying the products. This compares to the fact that only 9% of those 55-years-old or older bought appearance chemicals.

Over a third (35%) of all appearance chemicals went to an auto parts store to buy the product. Again, those under 25 bought appearance chemicals at an auto parts store at a greater rate (37%) than those over 55 (25%). Otherwise, a quarter of all vehicle maintainers bought appearance chemicals at discount stores, 9% at new car dealers, 7% at automotive specialty outlets, and 6% at car washes.

It's pretty simple to spray on a protectant or vinyl cleaner appearance chemical and so it's no surprise that 79% of all the buyers of these products had them applied by a DIYer, mostly the buyer him or herself.

When asked why, just under half (48%) said applying appearance chemicals was an easy task or they could do it. Another third (36%) said they did it to save money.

However, another 9% of all appearance chemical buyers apparently weren't as concerned about costs and had a car dealer apply the appearance chemical; 6% had it applied by an automotive specialty outlet; while 5% went to a car wash or detailing shop for an application.

In all, just over a quarter (26%) specified one brand of appearance chemical, a brand which in many ways developed the entire product category.

But over half (57%) of all appearance chemical buyers didn't specify any brand at all. Those less than 25-years-old (80%), those making over $40,000 in annual household income (61%), and non-DIYers (82%) made up the largest groups, by demographic areas, of non-specifiers. When asked why they didn't choose a brand, the largest group (23%) said they had no knowledge of product brands, while another 12% said there was no difference between brands. A total of 17% accepted whatever the professional applier used.

## WHAT TYPE OF VEHICLE THEY BOUGHT PROTECTANTS FOR

Three quarters of all vehicle maintainers bought protectants for their cars. But,Non-DIYers bought more protectants for cars than did dedicated DIYers by a large margin.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 84% | 83% | 57% | 60% |
| Light truck | * | 4 | 9 | 7 |
| Van | * | 6 | 9 | * |
| Utility vehicle | * | * | 3 | 12 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question; interestingly enough, many dedicated DIYers don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Technician installed | 29% | 13% | 21% | 12% |
| Don't know brands | 21 | 27 | 7 | 37 |
| No difference | 9 | 13 | 13 | 12 |
| Cheapest around | * | * | 8 | 15 |

## HOW MANY MAINTAINERS SPECIFY PROTECTANTS BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 18% | 34% | 59% | 50% |
| Don't specify | 82 | 66 | 41 | 50 |

## WHERE MAINTAINERS BOUGHT PROTECTANTS

The automotive parts store is still the most popular place for protectants purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | 37% | 28% | 43% | 35% |
| Discount store | * | 21 | 31 | 46 |
| Car wash | 41 | 2 | 4 | * |
| Specialty installer | 8 | 5 | 14 | * |
| Car dealership | * | 17 | * | 12 |

## WHO INSTALLS PROTECTANTS

Dedicated DIYers are far more likely to install their own protectants than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | 37% | 76% | 92% | 88% |
| Car wash | 26 | 2 | 3 | * |
| Specialty installer | 16 | 5 | 6 | * |
| Car dealership | * | 17 | * | 12 |
| Gas station | 7 | 3 | * | * |

## WHY DIYERS INSTALL THEIR OWN PROTECTANTS

Most DIYers install their own protectants because it's something that's easy to do and they save money doing it.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| To save money | * | 33% | 28% | 55% |
| Simple to do | * | 35 | 24 | 13 |
| Can do it | * | 20 | 29 | 11 |
| Enjoy it | * | 11 | 22 | 13 |
| Convenience | * | 8 | 4 | 6 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN PROTECTANTS

Most of those other than dedicated DIYers who didn't install their own protectants say they didn't have time to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 28% | 19% | 15% | * |
| Car already in for service | * | 4 | 39 | 50% |
| Too busy | 30 | 25 | 30 | * |
| Don't like doing it | 18 | 5 | * | * |
| Car being inspected | * | * | * | 56 |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE CARS REPAIR STUDY

# Shocks & STRUTS

Shock absorbers and MacPherson struts were purchased by 16% of all vehicle maintainers during the past year. At 21% to 9%, twice the percentage of male maintainers bought shocks or struts than female maintainers.

The auto parts store is the purchase place of choice for the largest single group of shock and strut buyers at 29%. However, 14% went to a specialty installer; 12% went to an independent garage; 13% went to a department store such as Sears; 14% went to a car dealer; and 7% went to a gas station. So, there's no single outstanding source of shock and strut purchases.

The rise of use of the strut, which is more expensive and difficult to install than a shock, has cut into the DIYability of shock/front end repairs. Even so, a quarter (26%) of all those who bought shocks and struts either installed them themselves or had a friend or relative do the job. Otherwise, 18% went to an independent garage, 13% went to a specialty installer; 13% went to a car dealer; 8% went to a gas station; and 8% went to a department store with service facilities—numbers very similar to the places from which stocks and struts were acquired.

As mentioned, struts are more complicated to install than shocks, and, indeed, 58% of those who didn't install these products said that they didn't because of a lack of job knowhow. Almost a quarter (23%) said they were too busy, while 19% said they lacked the proper tools. Replacing a MacPherson strut requires a spring compressor which is not commonly found in home tool collections.

With such a small percentage of shocks and struts DIY installed, one might wonder how important brand names were to the consumers. Apparently they were to 51% of the maintainers who said they asked for specific brands. And, while 6% of those who asked for a brand said they asked for "MacPherson" brand struts, most named brands that actually exist.

Among the minority who didn't ask for a specific brand, the largest group (42%) obviously had professional installation and took whatever the technician installed. Another 30% said they didn't know the difference between brands. Only 7% said they believed that there was no difference between brands.

## WHAT TYPE OF VEHICLE FOR WHICH THEY BOUGHT SHOCKS AND STRUTS

Three quarters of all vehicle maintainers bought shocks and struts for their cars. But, non-DIYers bought more shocks and struts for cars than did dedicated by a large margin.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 100% | 74% | 80% | 64% |
| Light truck | * | 11 | 16 | 28 |
| Van | * | 12 | * | 8 |
| Utility vehicle | * | 3 | 4 | * |

* This response not given by anyone in this group.

## WHERE MAINTAINERS BOUGHT SHOCKS AND STRUTS

The automotive parts store is still the most popular place for shocks and struts purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | *% | 9% | 34% | 62% |
| Car dealership | 36 | 6 | 17 | 12 |
| Specialty installer | 46 | 15 | 15 | * |
| Independent garage | 18 | 21 | 11 | * |
| Dept. store | * | 23 | 8 | 11 |

## WHO INSTALLS SHOCKS AND STRUTS

Dedicated DIYers are far more likely to install their own shocks and struts than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | * | 6% | 4% | 85% |
| Specialty installer | 36 | 14 | 15 | * |
| Car dealership | 36 | 6 | 22 | 4 |
| Independent garage | 18 | 21 | 32 | * |
| Dept. store | * | 14 | 8 | 4 |

## WHY DIYERS INSTALL THEIR OWN SHOCKS AND STRUTS

DIYers install their own shocks and struts for a variety of reasons.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| To save money | * | * | * | 45% |
| Needed the job done | * | 100% | * | 17 |
| Can do it | * | * | 100% | 4 |
| Simple to do | * | * | * | 12 |
| Enjoy it | * | * | * | 9 |

* This response not given by anyone in this group.

## HOW MANY MAINTAINERS SPECIFY SHOCKS AND STRUTS BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | * | 41% | 54% | 84% |
| Don't specify | 100% | 59 | 46 | 16 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Technician installed | 36% | 46% | 56% | * |
| Don't know brands | 64 | 36 | * | * |
| No difference | * | * | 10 | 53 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN SHOCKS AND STRUTS

Most of those other than dedicated DIYers who didn't install their own shocks and struts say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 82% | 62% | 53% | * |
| Too busy | 10 | 26 | 17 | 61% |
| Don't have tools | * | 15 | 34 | 20 |
| Don't like doing it | 19 | 3 | 9 | * |
| Too old | * | 4 | * | 20 |

* This response not given by anyone in this group.

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE CARS REPAIR STUDY

# Electronic ACCESSORIES

In a recession such as the country has been in for over a year now consumers stop buying big ticket items. Electronic accessories such as car sound or security systems often are considered big ticket items. Even so, 11% of all vehicle maintainers purchased some sort of electronic accessory during the past year.

Unlike most other aftermarket product categories, consumers tend to go to other than auto parts stores for most electronic accessories purchases. Only 14% of all buyers of these products got them at auto parts stores.

In all, 16% of all electronic accessory buyers acquired what they bought from car dealers. Another 11% bought electronic accessories from specialty installers such as audio specialists. And, independent garages were the outlet of choice for 11% of electronic accessories consumers.

Electronic accessories are often relatively demanding to install, especially for someone whose DIY skills are nominal. Therefore, it's no surprise that the majority of electronic accessories are professionally installed. Indeed, just over a third (34%) of non-professionals – the respondent, a friend, or relative – installed the electronic accessories they purchased.

Car dealers did the job for another 16%; specialty installers for 21%; and an independent garage for 14%. Some 5% said simply "a mechanic" put their electronic accessory in for them.

Electronic accessories are usually well advertised in consumer publications, radio, and television. They are high profile items. Therefore, it's not surprising that over half (54%) of purchasers asked for a specific brand of electronic accessory when they went shopping. Interestingly, over three quarters (78%) of buyers aged between 45 and 54-years-old requested a specific brand, while only a quarter of all those over 55-years-old did the same. Does advertising reach fall off with older consumers?

It's also a telling tribute to consumer advertising that only 20% of those who didn't go in to buy with a brand in mind said they didn't because they had "no knowledge of product brands."

## WHERE MAINTAINERS BOUGHT ELECTRONIC ACCESSORIES

The specialty installer is the most popular place for electronic accessories purchases among most DIYers while dedicated DIYers shop at auto parts stores for these products.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Specialty installer | 24% | 12% | 5% | 7% |
| Car dealership | 23 | 15 | 20 | 9 |
| Independent garage | 14 | 18 | 5 | 7 |
| Auto parts store | * | 4 | 25 | 28 |
| Discount store | 14 | 7 | 6 | * |

## HOW MANY MAINTAINERS SPECIFY ELECTRONIC ACCESSORIES BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 38% | 51% | 52% | 72% |
| Don't specify | 62 | 49 | 48 | 28 |

## WHO INSTALLS ELECTRONIC ACCESSORIES

Dedicated DIYers are far more likely to install their own electronic accessories than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | * | 18% | 45% | 71% |
| Car dealership | 35% | 19 | 15 | * |
| Specialty installer | 24 | 27 | 20 | 7 |
| Independent garage | 14 | 22 | 9 | 7 |
| Technician | * | 9 | 6 | * |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know brands | 44% | 17% | 11% | 29% |
| Technician installed | * | 24 | 11 | 24 |
| No difference | * | * | 30 | 24 |
| Cheapest available | * | 9 | * | * |

## WHAT TYPE OF VEHICLE FOR WHICH THEY BOUGHT ELECTRONIC ACCESSORIES

Three quarters of all vehicle maintainers bought electronic accessories for their cars. But, non-DIYers bought more electronic accessories for cars than did dedicated by a small margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 87% | 78% | 75% | 71% |
| Light truck | * | 12 | 11 | 14 |
| Van | * | 4 | * | 7 |
| Utility vehicle | 14 | 7 | 5 | * |

## WHY DIYERS INSTALL ELECTRONIC ACCESSORIES

Most DIYers install their own electronic accessories because they can.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Can do it | * | 56% | 59% | * |
| To save money | * | * | 39 | 36% |
| Needed the job done | * | 50 | * | 10 |
| Convenient | * | 50 | * | * |
| Enjoyed it | * | * | * | 42 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN ELECTRONIC ACCESSORIES

Most of those other than dedicated DIYers who didn't install their own electronic accessories say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 87% | 71% | 61% | 63% |
| Installed free | * | 4 | 14 | 20 |
| Too busy | 26 | 16 | 13 | * |
| Want it done right | * | * | 6 | 37 |
| No tools | * | 12 | * | * |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Tire CARE

Tire cleaning products are a relatively new product in the aftermarket mix, yet already they have achieved a significant niche. Overall, 17% of vehicle maintainers bought some tire cleaning products over the previous year.

The auto parts store is the most popular purchasing place for tire cleaners. Some 41% of all purchasers bought these products at an auto parts store. Only 15% bought them at discount stores, the second most popular outlet.

Interestingly, the product category is almost unique among aftermarket products in that roughly the same percentage of women as men buyers went to auto parts store for their purchase. Generally, men are more apt to buy at auto parts stores than women, so this is apparently a good product to use to get women purchasers into auto parts stores.

Over 20% more maintainers with annual household income levels over $40,000 purchased tire cleaning products at auto parts stores than those with annual household income levels of under $20,000. In other words, these products bring not only women but better heeled maintainers into auto parts stores.

Just over half demanded a specific tire cleaning product brand; men and younger maintainers were more apt to specify a brand than women and older maintainers.

While almost three quarters (73%) of men used the tire cleaning product they bought, just over half (51%) of the women did the same. However, another 15% of women buyers had another household member use the product, compared to only 1% of men purchasers. This is an easy-to-use product and, indeed, in all demographic areas, over half the product buyers were also the product users. After women, the smallest group of users was that whose household incomes were under $20,000 (56%), while the largest, besides DIYers, was those with incomes of between $20,000 and $30,000 (78%).

Among those who didn't apply their own tire cleaners, 11% of all purchasers had their tires cleaned when they had their cars washed or detailed. This was the largest single place where non-DIYers had these products used. A third of all these non-installers said they didn't put their own cleaner on because they were too busy or didn't have the time for the job.

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question; non-DIYers don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know brands | 28% | 23% | 14% | 6% |
| Technician installed | 33 | 18 | 7 | 12 |
| No difference | 13 | 13 | 20 | 44 |
| No reason | * | 2 | * | * |

## WHO INSTALLS TIRE CARE PRODUCTS

Dedicated DIYers are far more likely to install their own tire care products than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | 11% | 74% | 85% | 93% |
| Car wash | 40 | 13 | 7 | * |
| Independent garage | 11 | 8 | 5 | 2 |
| Gas station | 10 | 4 | * | 3 |
| Specialty installer | 6 | 1 | 3 | 2 |

## WHY DIYERS INSTALL THEIR OWN TIRE CARE PRODUCTS

Most DIYers install their own tire care products to save money.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| To save money | * | 16% | 19% | 44% |
| Can do it | * | 29 | 22 | 24 |
| Simple to do | * | 21 | 28 | 26 |
| Enjoy it | * | 17 | 19 | 21 |
| Make sure it's done right | * | 7 | 10 | 12 |

## HOW MANY MAINTAINERS SPECIFY TIRE CARE PRODUCTS BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 16% | 50% | 58% | 60% |
| Don't specify | 84 | 50 | 42 | 40 |

## WHERE MAINTAINERS BOUGHT TIRE CARE PRODUCTS

The automotive parts store is still the most popular place for tire care products purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | 18% | 37% | 52% | 43% |
| Car wash | 34 | 16 | 8 | 5 |
| Discount store | * | 17 | 15 | 17 |
| Independent garage | 22 | 3 | 7 | * |
| Gas station | 10 | 2 | 3 | 8 |

## WHAT TYPE OF VEHICLE FOR WHICH THEY BOUGHT TIRE CARE PRODUCTS FOR

Three quarters of all vehicle maintainers bought tire care products for their cars. But, non-DIYers bought more tire care products for cars than did dedicated by a slight margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 73% | 75% | 71% | 63% |
| Light truck | * | 6 | 8 | 15 |
| Van | * | 3 | 5 | 3 |
| Utility vehicle | 5 | 2 | 2 | 3 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN TIRE CARE PRODUCTS

Most of those other than dedicated DIYers who didn't install their own tire care products say they didn't have the time.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Too busy | 28% | 36% | 36% | 19% |
| Don't know how | 23 | 10 | 6 | * |
| Don't like doing it | 22 | 13 | 6 | 24 |
| Want it done right | 5 | 6 | 6 | * |
| Free service | 11 | * | 14 | * |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Lighting

A quarter of all vehicle maintainers bought some sort of lighting product such as headlights or off-road lights during the past year.

There is an interesting curve of lighting product buyers by age group that starts low, climbs, and then drops off at the end of the curve. Among maintainers 25-years-old or younger, 22% bought lights; among those 25 to 34, 26% bought lights; among those 35 to 44, 29% bought lights; among those 45 to 54, 42% bought lights; and then the figure drops off to 14% among those 55-years-old or more.

Almost half (48%) of lighting product buyers bought the products at auto parts stores. Another 11% returned to a car dealer, while 11% also went to a discount store. Independent garages were patronized by 6% of lighting product buyers.

However, there's a different story in who installed lighting products. Fully 11% of lighting product buyers had them put on at a gas station, while 9% went to a car dealer and 6% went to an independent garage. DIYers made up 65% of lighting product installers.

Of this last group, almost half (47%) installed their own lighting products to save money. However, almost a third (30%) did it because they found the job to be simple, while another quarter (24%) said they did it just because they could. Only 4% of lighting product DIY installers said they did it mostly because they enjoyed doing the job.

Lighting product manufacturers have spent a great deal of money getting their names known by the public. However, only 30% of buyers said they asked for some specific brand of lighting product when they shopped. And, of those, fully 18% said the brand they wanted was "Halogen" lights—perhaps a well known name among lighting product users, but not an actual brand name.

When asked why they didn't specify a brand, almost half of those who didn't (47%) said that they either didn't have any knowledge of brand names or that there was no difference between brands. Another 23% said they took whatever lighting product the professional installer put on their vehicle. Obviously, more education is needed at all levels to educate consumers as to brands and their differences.

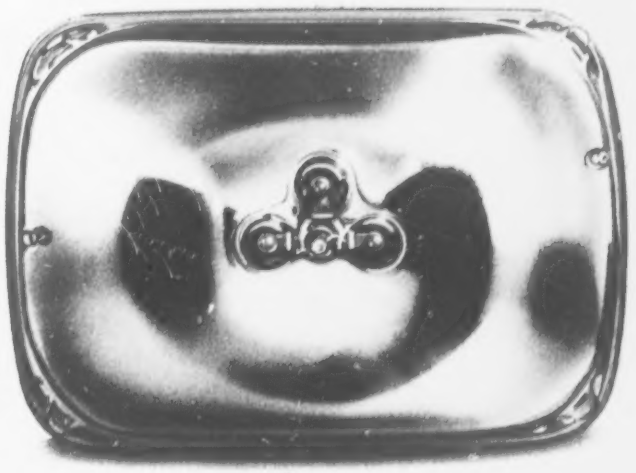
## HOW MANY MAINTAINERS SPECIFY BRAND NAME LIGHTING PRODUCTS

DIYers are more brand conscious, but almost two-thirds of even the most dedicated DIYers don't worry about brand names.

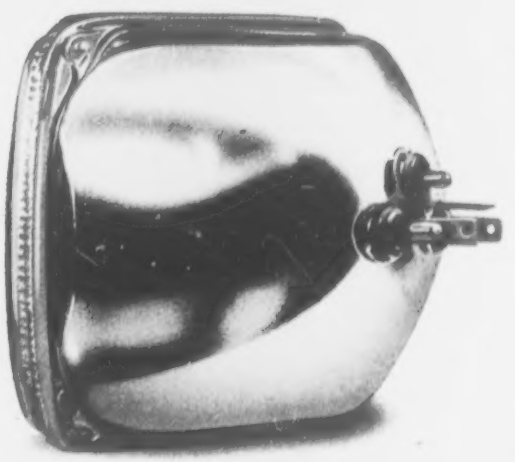
**MAINTAINERS**

| DIYer | Non- | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 7% | 31% | 36% | 34% |
| Don't specify | 93 | 69 | 64 | 66 |


# It takes more than a name



We advertise them.



Promote them.

Merchandise them.

Halogen headlights might still be a novelty if it weren't for GE. Over the years, no other automotive lighting manufacturer has invested more to develop the market.

So is it any wonder that GE outperforms other halogen brands 2 to 1 in awareness and preference.* We bring customers to your store to buy GE Halogens, which means you make more high-profit sales.

*Independent statistically representative study. 7/88

C-918A

## WHERE MAINTAINERS BOUGHT LIGHTING PRODUCTS

The automotive parts store is still the most popular place for lighting products purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Auto parts store | 23% | 43% | 57% | 55% |
| Gas station | 33 | 6 | 2 | 11 |
| Car dealership | 18 | 15 | 10 | 3 |
| Independent garage | 6 | 12 | 3 | 3 |
| Discount store | 7 | 3 | 13 | 22 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Technician installed | 45% | 25% | 10% | 22% |
| Don't know brands | 35 | 22 | 15 | 19 |
| No difference | 6 | 21 | 34 | 38 |
| Cheapest there | * | * | 3 | * |

## WHO INSTALLS LIGHTING PRODUCTS

Dedicated DIYers are far more likely to install their own lighting products than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| DIYer | 14% | 50% | 87% | 83% |
| Gas station | 38 | 10 | 2 | 11 |
| Car dealership | 12 | 11 | 9 | 3 |
| Auto store | 11 | 6 | 7 | * |
| Specialty installer | 13 | 2 | * | * |

## WHY DIYERS INSTALL THEIR OWN LIGHTING PRODUCTS

Most DIYers install their own lighting products to save money.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| To save money | * | 22% | 46% | 55% |
| Can do it | * | 38 | 18 | 28 |
| Simple to do | * | 39 | 42 | 11 |
| To save time | * | 13 | 5 | 14 |
| Needed the job done | * | * | 18 | 26 |

* This response not given by anyone in this group.

## WHAT TYPE OF VEHICLE FOR WHICH THEY BOUGHT LIGHTING PRODUCTS

Vehicle maintainers who bought three quarters of the lighting products sold, bought them for cars. But, non-DIYers bought more lighting products for cars than did dedicated or heavy DIYers by a large margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Cars | 87% | 81% | 69% | 59% |
| Light truck | * | 10 | 21 | 15 |
| Van | 7 | 2 | 6 | 3 |
| Utility vehicle | * | 4 | 2 | 12 |

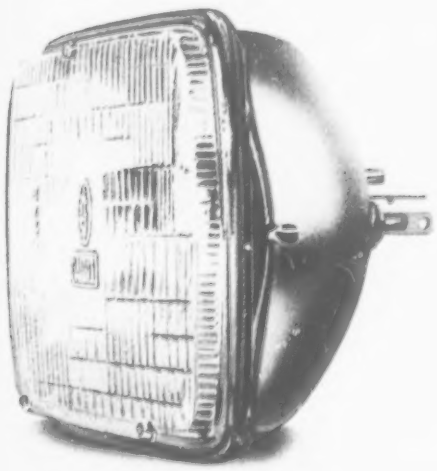
## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN LIGHTING PRODUCTS

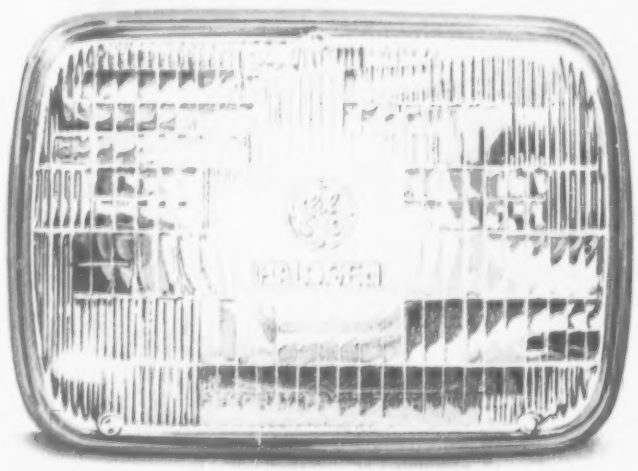
Most of those other than dedicated DIYers who didn't install their own lighting products say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light DIYer | Medium DIYer | Heavy DIYer |
|---|---|---|---|---|
| Don't know how | 57% | 62% | 62% | 34% |
| Too busy | 13 | 23 | 9 | 18 |
| Don't have tools | 12 | 11 | 19 | * |
| Car already being serviced | 6 | 2 | 12 | * |
| Don't like doing it | 12 | * | * | 18 |


# to sell halogen headlights.





Package them. That's why our name outshines all others.

When it comes to halogens, stock GE. It's the name your customers know and buy.
For more information, just call 1-800-GE-LIGHT.

GE Lighting

(Circle 22 on Product Information Card)

CONSUMER AUTOMOTIVE CARS REPAIR STUDY

# Batteries

Mild winters have cut into battery sales over the past several years. Even so, a third of all vehicle maintainers bought a battery during the past year, making them the batteries sixth most purchased product category in the study.

Batteries are that rare product category where traditional department stores—one major department store in particular—have an edge, with 29% of all battery buyers shopping for one there. Indeed, the private label brand sold by this department store chain leads among brands mentioned, at 48%, among those who specified a brand.

Auto parts stores at 27% are a very close second place among outlets from which maintainers purchased batteries. In terms of percentages, only slightly more men than women purchase batteries at both auto parts stores and department stores. As seen by percentages, women prefer gas stations at almost two to one over men who buy batteries there.

Since most places that sell batteries offer free installation service, we've always wondered why anyone would install them themselves. However, just under half (43%) of those who bought batteries either put them in themselves or had a friend or relative do the job. The reasons were pretty evenly split up between saving money (37%), the fact that it's a simple job to do (30%), and the respondent saying that it was just something he or she could do (24%).

Since, however, most purchasers have their batteries installed professionally, selling the outlet buyer or technician becomes almost as important as selling the end user. Indeed, fully a quarter of all those who did not specify a brand simply took whatever brand the professional technician installed. Another 20% of non-brand-specifiers said they were unfamiliar with the different brands, which is why they didn't specify any particular brand. However, less than 1% said they had, at best, a limited choice and so they took what was in stock.

Interestingly, of these same purchasers of professionally installed batteries, only 8% said they had it done by the outlet since it was a free service. Many more (39%) said they didn't know how to do the job, while 11% said they were too busy to do it.

## WHO INSTALLS BATTERIES

Dedicated DIYers are far more likely to install their own batteries than other DIYers, even though professional installation is often free.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | 10%* | 34% | 54% | 85% |
| Dept. store | 24 | 20 | 21 | 8 |
| Auto parts store | 15 | 8 | 10 | 2 |
| Gas station | 22 | 9 | 4 | 3 |
| Independent garage | 13 | 13 | 6 | 3 |

* A friend or relative

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs without question.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Technician installed | 31% | 33% | 16% | 7% |
| No difference | 4 | 13 | 17 | 34 |
| Don't know brands | 47 | 16 | 10 | 7 |
| No reason | 3 | * | * | * |

## WHERE MAINTAINERS BOUGHT BATTERIES

The department store is the most popular place for batteries purchases among most vehicle maintainers, although dedicated DIYers prefer auto parts stores.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Dept. store | 25% | 29% | 34% | 27% |
| Auto parts store | 15 | 21 | 34 | 43 |
| Gas station | 22 | 12 | 3 | 5 |
| Discount store | 5 | 9 | 10 | 14 |
| Specialty installer | 5 | 8 | 8 | 2 |

## HOW MANY MAINTAINERS SPECIFY BATTERIES BY BRAND NAME

Despite years of consumer advertising, a surprisingly large number of all types of maintainers don't specify brands.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 27% | 38% | 50% | 55% |
| Don't specify | 73 | 62 | 50 | 45 |

## WHAT TYPE OF VEHICLE THEY BOUGHT BATTERIES FOR

Three quarters of all vehicle maintainers bought batteries for their cars. But, Non-DIYers bought more batteries for cars than did dedicated by a large margain.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 93% | 84% | 65% | 63% |
| Light truck | 4 | 8 | 17 | 15 |
| Van | 2 | 3 | 6 | 9 |
| Utility vehicle | 2 | 2 | 3 | 3 |

## WHY DIYERS INSTALL THEIR OWN BATTERIES

Most DIYers install their own batteries because it's a simple job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Simple to do | * | 44% | 30% | 22% |
| To save money | * | 30 | 36 | 43% |
| Can do it | * | 26 | 28 | 20 |
| Needed the job done | * | 16 | 12 | 16 |
| Enjoy it | * | 3 | 2 | 9 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN BATTERIES

Most of those other than dedicated DIYers who didn't install their own batteries say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 69% | 40% | 14% | 9% |
| Too busy | 8 | 12 | 13 | 20 |
| Car was in for service | 7 | 6 | 9 | 32 |
| Want it done right | 2 | 6 | 5 | 10 |
| Don't like doing it | 11 | 10 | 10 | * |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE CARS REPAIR STUDY

# Filters

*(Air, Fuel, Oil)*

You change your oil, you change a filter. And, if you change your oil every 3,000 miles or three months as you should—and quite a large percentage of motorists do just that—you'll change your filter, too. Hence, there's bound to be a large filter market in oil filters alone.

Therefore, it's not surprising that 71% of all vehicle maintainers bought at least one filter during the course of the previous year. This makes it the second most purchased item overall, just behind motor oil which is linked to filters in most minds.

Quick lube operations have taken a major bite into the oil and filter market and, indeed, 19% of all those who said they bought filters said they bought them at a specialty installer such as a quick lube. A percentage more probably bought filters at such a location when they got their oil changed but they didn't think of themselves as buying filters and hence didn't mention it to our researchers.

However, 29% of all filter buyers went to an auto parts store for the filter they bought, far ahead of the 18% who went back to a car dealer and further still from the 8% who bought at a discount store. Another 8% bought a filter at an independent garage.

Just over a third (36%) of all filter buyers had the filter installed by a DIYer, which is a low figure among automotive products. The most popular single professional installer was the specialty installer—the quick lube—from which 18% of filter buyers had filters installed. Another 17% went to a car dealer, while 10% went to an independent garage. A total of 5% also said they had a filter installed by an auto parts store with service bays.

Just a tad more than a quarter (27%) of all filter buyers asked for a specific brand; few quick lubes offer such a choice. Indeed, when asked why they didn't ask for a brand by name, 39% said that they took whatever the professional installer used, while 1% said they had no choice available.

Among those who chose to install their own filters, almost half (49%) said they did so to save money. The ease of the job appealed to over a quarter (28%) while 23% said they did it because they could. Another 6% said the job needed doing, while 5% said it was convenient.

## WHAT TYPE OF VEHICLE THEY BOUGHT FILTERS FOR

Three quarters of all vehicle maintainers bought filters for their cars. But, non-DIYers bought more filters for cars than did dedicated by a large margin.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 85% | 82% | 67% | 59% |
| Light truck | 8 | 4 | 13 | 9 |
| Van | 1 | 5 | 5 | 5 |
| Utility vehicle | 2 | 2 | 1 | 3 |

## WHY DIYERS INSTALL THEIR OWN FILTERS

Most DIYers install their own filters to save money.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| To save money | * | 41% | 48% | 53% |
| Simple to do | * | 46 | 30 | 18 |
| Can do it | * | 18 | 28 | 21 |
| Needed the job done | * | 8 | 4 | 7 |
| Enjoy it | * | 4 | 2 | 6 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Most maintainers who don't specify brands just accept whatever the professional technician installs; non-DIYers don't know the difference between brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Technician installed | 44% | 43% | 31% | 17% |
| Don't know brands | 30 | 18 | 17 | * |
| No difference | 8 | 11 | 20 | 30 |
| No reason | 1 | 2 | * | * |

## WHERE MAINTAINERS BOUGHT FILTERS

The automotive parts store is still the most popular place for filters purchases among more capable DIYers while non- and light DIYers go for professional installation.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | 6% | 21% | 45% | 58% |
| Specialty installer | 19 | 24 | 15 | 9 |
| Car dealership | 22 | 22 | 16 | 4 |
| Gas station | 27 | 11 | 6 | 5 |
| Independent garage | 15 | 10 | 3 | 2 |

## WHY SOME MAINTAINERS DON'T INSTALL THEIR OWN FILTERS

Most of those other than dedicated DIYers who didn't install their own filters say they didn't know how to do the job.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Don't know how | 49% | 36% | 24% | * |
| Too busy | 17 | 19 | 19 | 32% |
| Don't like doing it | 15 | 14 | 9 | 11 |
| Want it done right | 5 | 4 | 2 | 11 |
| Inconvenient | 4 | 4 | 6 | 9 |

## WHO INSTALLS FILTERS

Dedicated DIYers are far more likely to install their own filters than other DIYers.

**MAINTAINERS**

| Installer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| DIYer | 7% | 22% | 55% | 85% |
| Gas station | 31 | 13 | 7 | 3 |
| Specialty installer | 21 | 19 | 19 | 8 |
| Car dealership | 21 | 22 | 15 | * |
| Independent garage | 16 | 13 | 4 | 3 |

## HOW MANY MAINTAINERS SPECIFY FILTERS BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 13% | 19% | 32% | 62% |
| Don't specify | 87 | 81 | 68 | 38 |

* This response not given by anyone in this group.

CONSUMER AUTOMOTIVE REPAIR STUDY

# Repair MANUALS

Automotive books or repair manuals are the unique product among all the aftermarket products that we study annually. After all, they can't be "installed" either by a professional or a DIYer, as can all the other products in the study. Moreover, they tend to be bought only once for each new or used car the maintainer acquires. And, they are found at a number of places that are not typical aftermarket outlets.

Nonetheless, they are an important aftermarket product line since 11% of all vehicle maintainers purchased an automotive book or manual during the previous year.

Significant groups that buy books, in larger percentages than the average, are men, maintainers 34-years-old and younger, maintainers with household incomes of $30,000 or less, medium and dedicated DIYers, and maintainers with three or more vehicles. On the other hand, women, older maintainers, light and non-DIYers, and those with only one vehicle buy repair manuals in significantly smaller numbers than the average.

Over half of automotive repair manual buyers bought them at auto parts stores. Almost another quarter (24%) went back to the car dealer, probably buying an OE manual. Men and women equally go to auto parts stores in which to buy repair manuals, while women also turn to car dealers.

Yet, repair manuals are also sold in significant numbers through non-traditional sources. In all, 4% of buyers got them through mail order, 1% from a military base exchange, 3% from a book store, 2% from a warehouse, and 2% from a flea market or swap meet.

Repair manual buyers tend to be brand conscious. In all, 63% of the buyers asked for a specific brand of manual, and one brand accounted for just over a third of sales to all buyers. Another 17% wanted the original car maker's repair manual. A total of 3% said they asked for a specific brand but didn't know what that brand it was. Go figure.

Men tend to ask for a specific brand more than women buying repair manuals. Maintainers aged between 35-years-old and 44-years-old also are more apt to request specific repair manual brands than the average, as are medium and dedicated DIYers.

Among those who didn't ask for a specific brand, 12% said they didn't know about the brands available, and 10% said there was no difference in brands. Another 6% bought whatever was on sale or the cheapest available, the same percentage as those who said they had no, or limited, choices of brands available.

## WHAT BRAND OF BOOKS MAINTAINERS BOUGHT

Chilton automotive manuals are the most named brand of automotive manual or book maintainers mentioned.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Chilton | * | 23% | 35% | 45% |
| OE Manufacturer's | * | 18 | 26 | 8 |
| All others | 47% | 5 | 9 | 12 |

## WHAT TYPE OF VEHICLE THEY BOUGHT BOOKS FOR

Three quarters of all vehicle maintainers bought books and manuals for their cars.

**MAINTAINERS**

| Vehicle | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Cars | 100% | 78% | 64% | 76% |
| Light truck | * | 12 | 9 | 4 |
| Van | * | * | 14 | 7 |
| Utility vehicle | * | * | * | 4 |

## WHERE MAINTAINERS BOUGHT BOOKS AND MANUALS

The automotive parts store is still the most popular place for books and manuals purchases.

**MAINTAINERS**

| Outlet type | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Auto parts store | 47% | 44% | 75% | 41% |
| Car dealership | 59 | 39 | 13 | 20 |
| Discount store | * | * | 5 | 8 |
| Dept. store | * | * | 4 | 7 |
| Book store | * | 6 | * | 4 |

## HOW MANY MAINTAINERS SPECIFY BOOKS BY BRAND NAME

DIYers are more brand conscious.

**MAINTAINERS**

| DIYer | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| Do specify | 47% | 45% | 74% | 69% |
| Don't specify | 53 | 55 | 26 | 31 |

## WHY SOME MAINTAINERS DON'T SPECIFY BRANDS

Maintainers who aren't DIYers don't believe there's a difference between automotive manual brands.

**MAINTAINERS**

| Reason | Non-DIYer | Light | Medium | Heavy |
|---|---|---|---|---|
| No difference | 100% | 14 | * | * |
| Don't know brands | * | * | 31 | 15 |
| No choice | * | * | 24 | * |
| On sale | * | 14 | * | * |

* This response not given by anyone in this group.